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State of Montana
Office of the Governor
Helena, Montana 59620

TED SCHWINDEN
GOVERNOR

Dear Business Executive:

The decade of the Eighties has meant a new emphasis on economic development in Montana. The creation of the Montana Department of Commerce was the first of many actions that reflect the positive attitude of my Administration toward economic development and promotion. In 1981, Montana repealed the inventory tax, increased the small business investment tax credit by 50 percent and created a small business licensing center --- all actions meant to encourage and assist new businesses in moving to Montana.

Montana state government is committed to the conscientious expansion of our economic base. If Montanans are to have jobs, we must design and foster a healthy economic climate for business while preserving our unique values for future generations.

Montana offers what is best in America --- clean air and water; space and energy; cities where "rush hours" last for minutes, not hours; spectacular beauty and unparalleled recreational opportunities. But in order to live here, we must have jobs for ourselves and our children.

In addition to offering the best ingredients for a clean and healthful atmosphere, Montana offers much of what is best for business in America --- resources, a positive attitude and a willing and able work force.

More than any other state in the nation, Montana is a land of opportunity --- a place to grow --- for businesses and for people. We've been laying the foundations for economic development in Montana; now we invite you to get in on the ground floor.

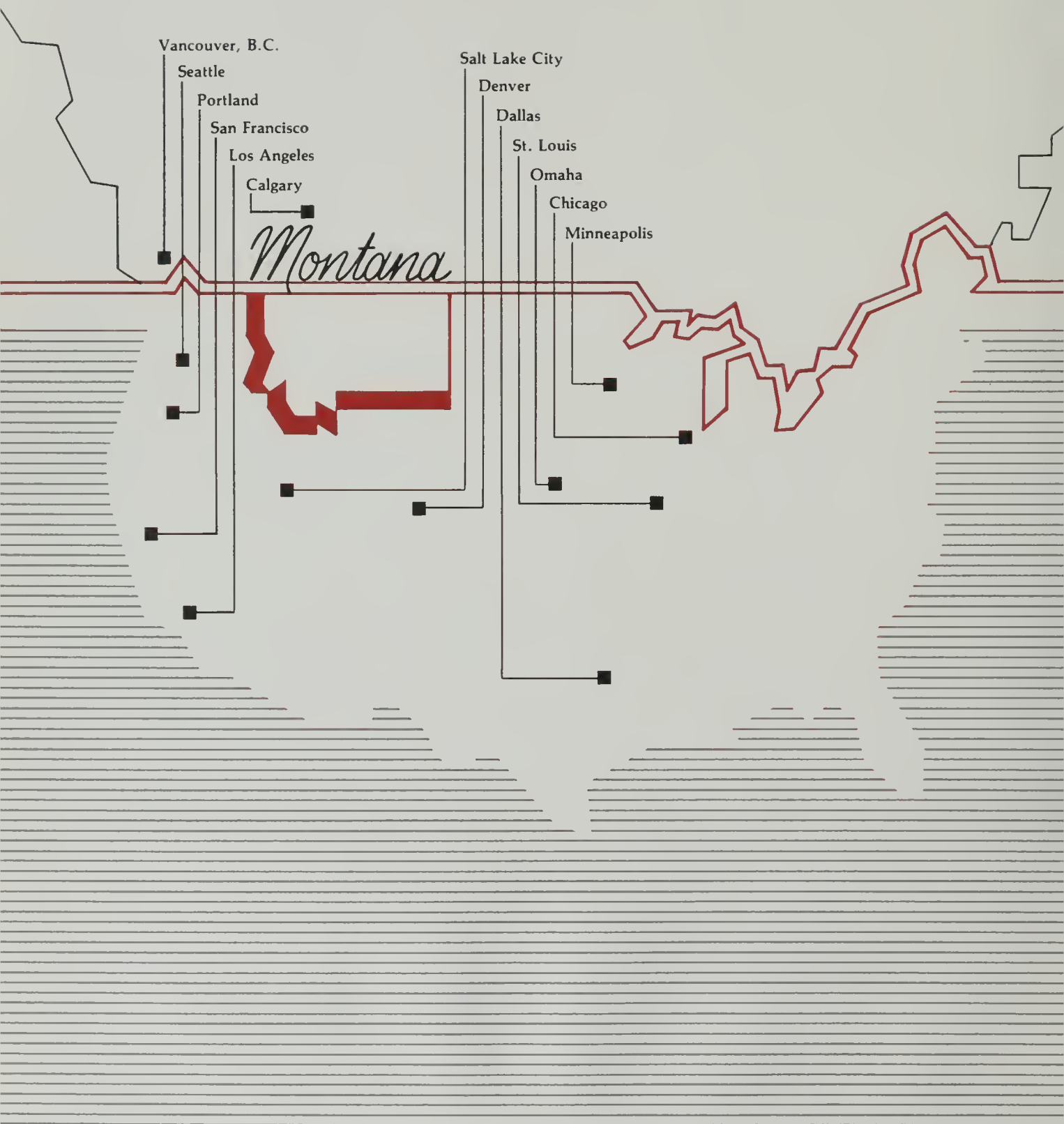
Sincerely,

Ted Schwinden

TED SCHWINDEN
Governor

Economic development is a high priority of my administration.

Ted Schwinden,
Governor


Vancouver, B.C.
Seattle
Portland
San Francisco
Los Angeles
Calgary
Montana
Salt Lake City
Denver
Dallas
St. Louis
Omaha
Chicago
Minneapolis

MONTANA

ECONOMIC PROFILE

Wide horizons.

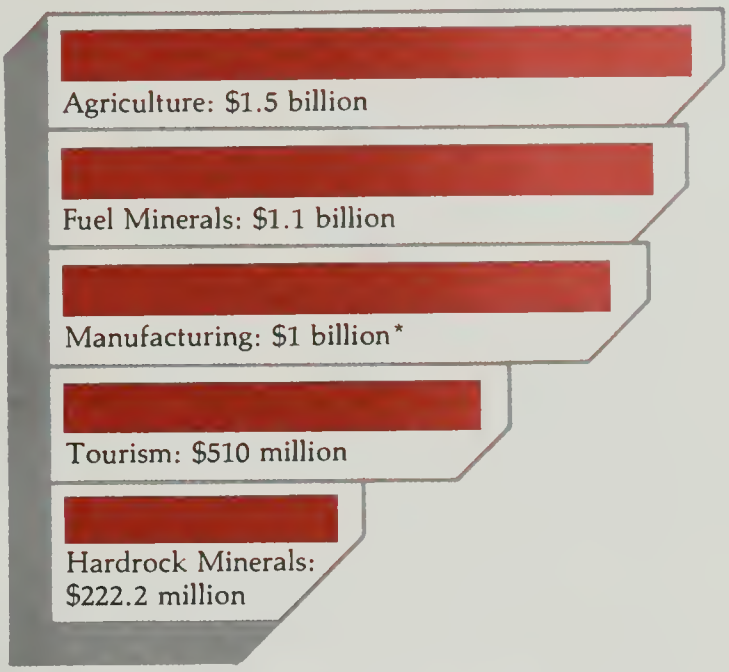
Montana... new opportunities for industry.

Since the 1800s, agriculture and mining have been Montana's economic mainstays.

Today, Montana is among the nation's leading producers of wheat and beef. By the end of this century, we will be a leading supplier of the nation's coal and a significant supplier of oil and natural gas.

Montana's manufacturing and processing industries have also remained strong over a 10-year period.

MONTANA GROSS RECEIPTS FROM INDUSTRY—1980



*Estimate based on 1977 levels; reflects manufacturing income, not gross receipts.

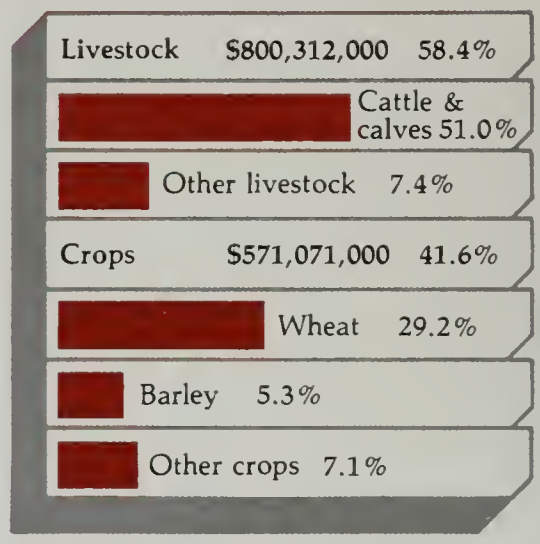
A diversity of industry characterizes Montana's economy. The long-standing agriculture and mineral segments continue to lead gross receipts. Manufacturing and tourism are on the increase, and fuel minerals are becoming significantly more important.

Agriculture

Agriculture is big business in Montana. The average farm or ranch is nearly 3,000 acres, often devoted to the production of a single crop. Advanced technology is a key ingredient in the management of these huge operations.

In 1980, agriculture contributed $1.5 billion to Montana's economy, the state's largest income producer. While cattle and wheat accounted for three-quarters of the total, Montana is a national leader in the production of several agricultural products—6th among the 50 states in wheat production, 4th in barley, 8th in beef cattle and 8th in sheep. Sugar beets, hay, honey and oats also rank high.

CASH RECEIPTS FROM 1979
MONTANA FARM PRODUCTS



The size and scope of Montana's agricultural industry is scaled to the state. Massive equipment tills huge land areas, and cattle graze on thousands of acres of pastureland.

Mining

As domestic energy development becomes an increasingly important national goal, minerals production is approaching agriculture as Montana's major income producer.

In 1980, mining contributed $1.3 billion in gross receipts to the state, with the fuel minerals—oil, coal and natural gas—accounting for more than three-quarters of the total.

Fuel Minerals

Petroleum far surpassed all other minerals in value, generating 48.7% of the state's 1980 income from minerals, followed by coal at 24.5%.

Montana is an oil-rich state with an important future. The state sits midway between Wyoming's active oil region and Calgary, Alberta. Current estimated reserves are more than 248 million barrels, with 28.5 million barrels produced during 1980.

In the first six months of 1981, there were 543 new oil and gas wells drilled in Montana, of which 42% were successful—adding 162 oil wells and 100 gas wells to the 3,700 producing wells in the state. Widespread exploration is expected to uncover additional reserves.

Of the 14 major coal producing states, Montana ranks first in coal resources and reserves, according to the U.S. Geological Survey. The Powder River Basin in Montana and Wyoming contains an estimated 70% of the nation's mineable coal, and Montana alone has more than 75 billion tons of recoverable low-sulphur reserves within her borders.

Coal represents 82% of America's fossil fuel reserves, and production and consumption of U.S. coal is estimated to reach 1.2 billion tons by 1985. Even though coal accounted for nearly a quarter of Montana's minerals income in 1980, less than ½ of 1% of the state's recoverable coal reserves has been mined. As America moves toward energy independence, Montana coal is expected to supply a significant percentage of the nation's electricity and synthetic fuels.

Non-Fuel Minerals

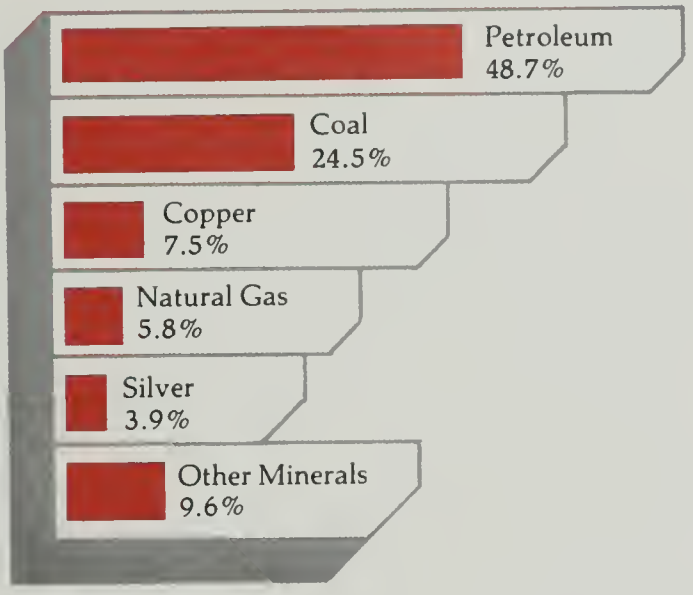
The lure of gold first brought settlers to Montana in the 1850s. Later in the century, copper mining in Butte provided a strong foundation for Montana's economy. Butte came to be known as "the richest hill on earth," yielding gold and silver in addition to copper, and continues to be the metal mining capital of the state.

In 1980, copper provided 7.5% of the state's minerals income, and silver 3.9%.

Montana is regarded as having one of the nation's highest potentials for metals mining, with substantial known deposits of copper, silver, gold, platinum, zinc, lead, iron, chrome, antimony, tungsten and molybdenum.

Sand, gravel and other non-metallic mineral commodities are also produced in Montana. The state has large deposits of phosphate rock, commercial bentonite, vermiculite, talc, building stone and limestone.

MONTANA INCOME FROM MINERALS



Montana's oil, gas and low-sulphur coal help fuel the nation and are increasingly important to the state's economy.

Manufacturing

Manufacturing in Montana currently provides income to the state approaching $1 billion annually. (Estimate based on 1977 Census of Manufactures.)

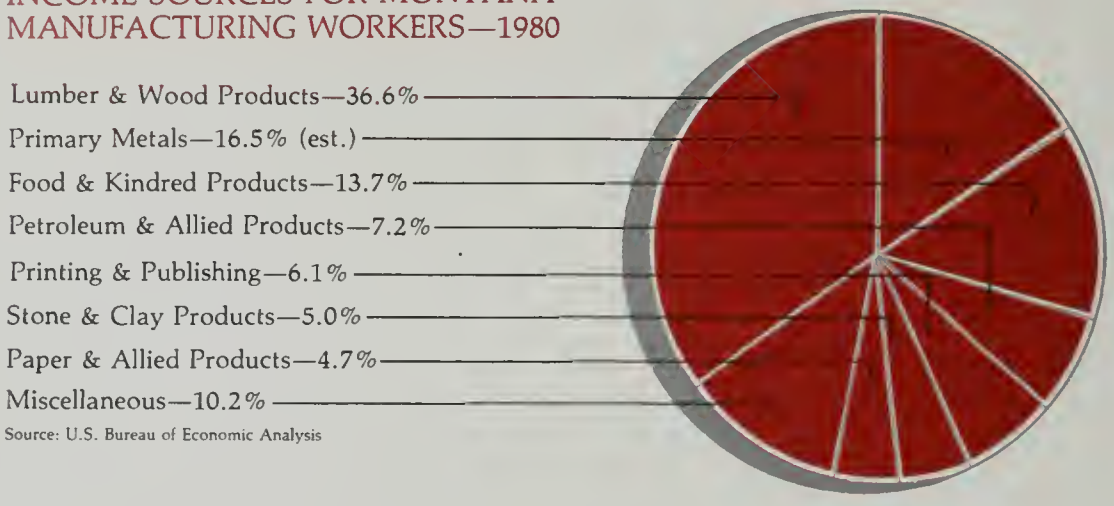
The majority of manufacturers are engaged in processing the state's raw materials.

Montana's timber industry supplies manufacturers of dimensional and specialty lumber, plywood, particle board, pulp, paper, modular building components, furniture and other wooden items, accounting for 37% of the state's personal income from manufacturing.

Processing of agricultural products accounts for 14% of Montana's personal income from manufacturing, and includes flour milling, meat processing, sugar refining, livestock and pet food manufacturing, and preparation of a variety of food products ranging from bread to burritos.

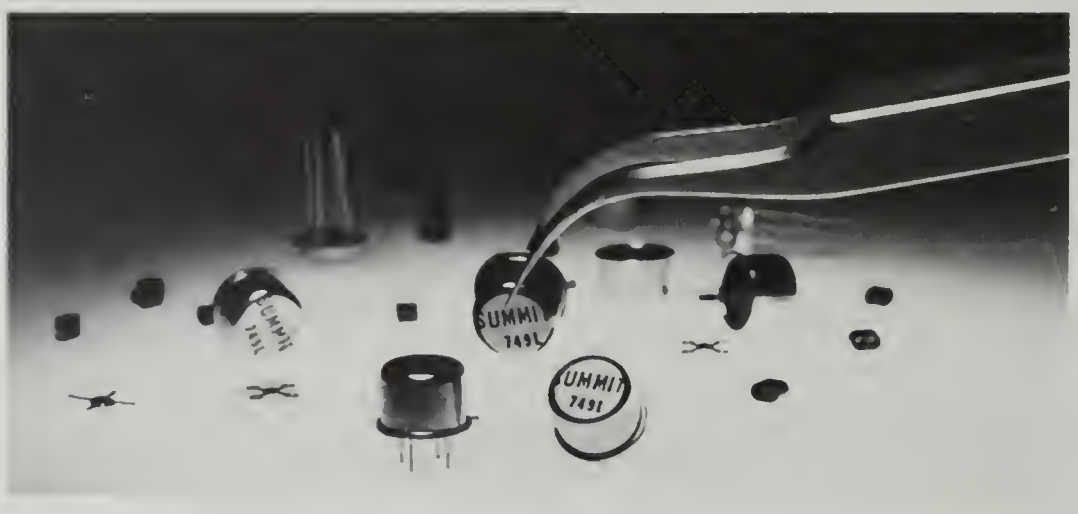
Other items manufactured in Montana include concrete products, heavy equipment for mining and agriculture, high-technology electronic components, fertilizers and chemicals, and wearing apparel.

INCOME SOURCES FOR MONTANA MANUFACTURING WORKERS—1980



Source: U.S. Bureau of Economic Analysis

From tractors to electronic components, sweaters to tables, a number of manufacturers have located in Montana and distribute worldwide.



Some of Montana's Major Manufacturers

American Chemet Corporation
American Colloid Co.
American Dental Mfg. Co.
Anaconda Aluminum Company
Anaconda Minerals Company
Asarco, Inc.
Beatrice Foods Co.
Big Bud Tractors, Inc.
Boise Cascade Corp.
Cenex
Champion International Corporation
Columbia Paint Co.
ConAgra Inc.
Conoco, Inc.
Crisafulli Pump Co.
Elk River Concrete Products Co.
Empire Steel Mfg. Co.
Exxon Co.
Friggstad Mfg.
Gallatin Homes Corp.
General Mills
W.R. Grace & Co.
Great Western Sugar Co.
Holly Sugar Corp.
Ideal Cement Co.
Kaiser Cement Corp.
Lumber Enterprises, Inc.
Louisiana Pacific Corp.
Midland Foods Inc.
Nordak Industries
Pfizer, Inc.
Pierce Packing Co.
Plum Creek Lumber Co.
Renn Industries
Roscoe Steel and Culvert Co.
Semitool, Inc.
Sirco Manufacturing, Inc.
St. Regis Paper Co.
Stauffer Chemical Co.
Stoltze Land and Lumber Co.
Summit Dana Industrial
Sun Wise, Inc.
Truzzolino Food Products Co.
U.S. Gypsum Co.

Tourism

Montana's breathtaking landscape, historic significance, recreational opportunities and western flavor annually draw several million tourists from across the nation and throughout the world.

Glacier National Park, Yellowstone National Park, Custer's Battlefield, Virginia City, the Lewis and Clark Trail ... all are landmarks of national importance.

Montana's tourism industry has experienced strong growth in recent years, adding an estimated $510 million to the state's economy in 1980. The number of visitors to Montana rose by 20% to more than four million between 1980 and 1981, with a corresponding increase in demand for food, lodging and other visitor services.

Tourism has grown from casual home-state pride to active promotion of Montana for others to enjoy. Tourism is big business in today's mobile society.

MONTANA

RECREATION
LIFESTYLE
CLIMATE

Naturally inviting.

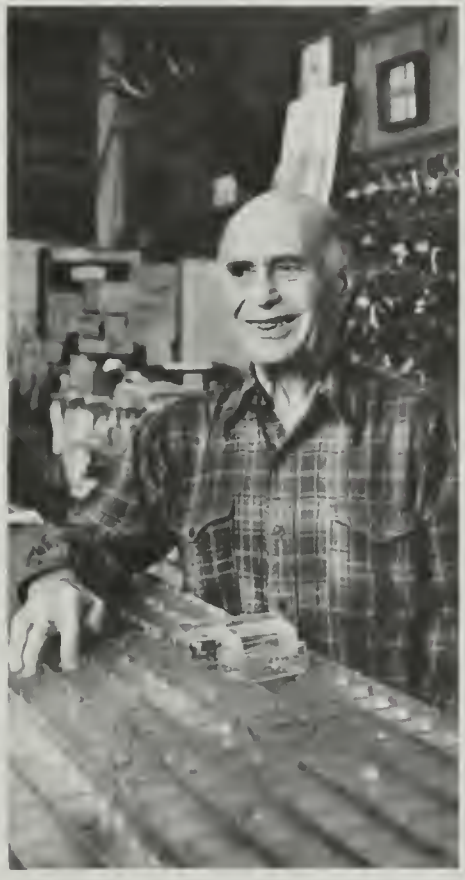
"People questioned the wisdom of my decision to move to Montana in 1938 and open a fly shop. I had been working as a physics professor in New York. But the move has been a good one for me.

Not only is Montana my favorite place to be, with the best fly-fishing in the United States, but it has been a business asset for me as well.

I still go out to the Yellowstone River with my rod every chance I get because I enjoy being out there.

The pursuit of trout is secondary."

Dan Bailey
Dan Bailey Flies and Tackle
Livingston, Montana



Dan Bailey is founder and part-owner of Dan Bailey Flies and Tackle, the largest manufacturer of flies in the United States. Bailey and his son, John, who is now president of the firm, employ 30 fly tiers who hand craft 350,000 flies a year in more than 500 different patterns. Through their extensive mail order service, the Baileys ship flies worldwide to about 50,000 customers, both individuals and businesses.

Recreation

Montanans have the luxury of being able to vacation in the same state where they live and work.

For outdoor sports enthusiasts, Montana offers a broad spectrum of activities. Summer is dominated by sailing and power-boating, canoeing, whitewater float trips, golfing, tennis, biking, hiking, backpacking and mountain climbing. In winter, Montana's dry climate produces some of the nation's finest powder snow at more than a dozen uncrowded alpine ski areas, as well as hundreds of wilderness trails for cross-country skiing.

Visitors and residents alike can follow the route of explorers Lewis and Clark along the Missouri, visit the scene of Custer's last stand, see Indian campsites and Gold Rush ghost towns, attend rodeos and Indian powwows, relax at dude ranches and hot springs resorts, tour Glacier and Yellowstone National Parks.

Wildlife

For the sportsman, Montana offers the nation's finest hunting and fishing. Deer, elk, antelope, pheasant, upland game birds, ducks and geese are plentiful, and the state is world-renowned for its blue-ribbon trout streams.

Good hunting and fishing are within minutes of every community in the state. Montana also has more than 400 licensed outfitters who conduct guided hunting trips into wilderness areas.

Montana's natural setting gives photographers and wildlife enthusiasts many opportunities to observe animals and birds that are seldom encountered in more populous states.

Buffalo still roam at the National Bison Range near Moiese. Bighorn sheep and mountain goats are often seen in many areas of western Montana, and the annual "Gathering of the Eagles" in Glacier Park attracts observers and photographers from throughout the world. Around 1,000 eagles, or 10% of all the eagles in the U.S., pass through the park each fall on their annual migration south.

Pronghorns (antelope) typically are seen in plains areas. Montana offers a close-up view of wildlife not often seen in many parts of the country.

Residents of Montana find recreation close to home, and in infinite variety. With few crowds or lines, Montanans take advantage of the great natural resources and beauty of the state at every opportunity.

Lifestyle

Safe, uncongested, unspoiled. Montana is the 4th largest state in the Union, yet its total population is less than 800,000 people. About 40% of those people live in or near the state's six largest cities.

Although Montana's land area is vast, city dwellers are within minutes of shopping, airports, outdoor recreation and work.

Urban Montana offers the same comforts as any modern city in the West, but the relatively small size of Montana's cities makes it easier for the individual to have a voice in community activities and decision-making. We still know our neighbors, and our children attend neighborhood schools.

Property values are still reasonable, and in many respects, the cost of living in Montana is lower than in the majority of the nation.

Montana also attracts more than its share of outstanding professional and technical minds—physicians, attorneys, artists, engineers, educators and others. People like to live here.

Urban living in Montana is a surprise—a variety and uniqueness that comes from the people who choose to live here.

MONTANA POPULATION— 10 LARGEST URBAN AREAS 1980 CENSUS

Billings	86,493
Great Falls	70,600
Missoula	65,476
Helena	38,853
Butte	36,817
Bozeman	28,604
Kalispell	22,860
Havre	13,738
Miles City	11,846
Anaconda	10,403

"Friendly, comfortable, and socially relaxed" is how most newcomers describe Montana cities, with active people making the most of their surroundings.

Schools

Montana has a strong public education system responsive to the educational needs of the individual child, ranging from the handicapped to the gifted and talented. Gifted and talented programs are supported locally, as well as by state and federal funding. Most elementary school students in Montana attend medium-sized schools of 100 to 400 students. Nearly 84% of Montana residents between 18 and 24 years old are high school graduates, compared with 79% nationally.

Two large universities, located in Bozeman and Missoula, offer undergraduate and graduate courses in a variety of disciplines, graduating more than 3,000 students annually in engineering, architecture, geology, forestry, mathematics, law, pre-medicine, the humanities, journalism, business, education, and other professions.

Montana's system of higher education also includes three four-year regional colleges, a mineral science college, four private four-year liberal arts colleges, three two-year community colleges, and about 40 vocational-technical schools and training centers.

Public schools in Montana give students a strong educational foundation. Students consistently rate high in competitions, and many go on to become leaders in their fields.

Cultural Activities

Montana is a major center for activities associated with Western art and artifacts, and buyers from around the world travel to the state to attend such annual events as the C.M. Russell Auction in Great Falls, the Kalispell Art Auction, and the Western Rendezvous of Art in Helena.

Virtually all Montana communities sponsor a number of energetic, high-quality programs for the visual and performing arts. The state has several symphonies, many theater groups and playhouses, and dozens of galleries and art centers devoted to art forms of all kinds.

Opportunities for participation in cultural activities are numerous, and draw people from all walks of life.

Climate and Geography

Surprisingly more than mountains.

- Montana's average annual precipitation is only 15 inches, so the weather is usually clear, sunny and dry.
- Montana weather is dry, not damp. Ten-degree weather in Montana does not feel nearly as cold as ten-degree weather in Chicago, for example, because Montana's humidity is comfortably low.
- Montana's average elevation is only 3,400 ft., lowest of all the Rocky Mountain states.
- Snowfall is not heavy in Montana, except in the mountains which account for only 1/3 of the state's land area.
- Annual snowfall in a number of Montana's largest cities is less than in Albany and Buffalo, New York; Denver, Colorado; Hartford, Connecticut; or Salt Lake City, Utah.
- Average maximum daytime temperature in most Montana cities in July is 85.9° F, higher than Minnesota, Washington and Wisconsin and only slightly lower than Colorado and Illinois.
- Average maximum daytime temperature in most Montana cities in January is 27.6° F, higher than Minnesota and Wisconsin and only 8-11 degrees colder than Colorado, Utah, Illinois and Washington.
- Winter cold waves are broken by periods of warm weather, when chinook winds bring unseasonably high temperatures to the state.
- Snow comes and goes in the winter months, rarely piling up all winter.

AVERAGE SNOWFALL—U.S. CITIES

	Elevation in Feet	Inches Annually
Pittsburgh, Pennsylvania	1,137	30.9
Miles City, Montana	**2,371**	**31.9**
Omaha, Nebraska	977	32.0
Des Moines, Iowa	938	32.3
Bismarck, North Dakota	1,647	39.1
Chicago, Illinois	595	39.7
Boston, Massachusetts	15	42.8
Milwaukee, Wisconsin	672	43.7
Minneapolis, Minnesota	834	45.1
Missoula, Montana	**3,213**	**49.0**
Cleveland, Ohio	777	50.5
Butte, Montana	**5,530**	**51.0**
Spokane, Washington	2,536	53.6
Billings, Montana	**3,124**	**55.7**
Salt Lake City, Utah	4,220	56.3
Great Falls, Montana	**3,330**	**57.4**
Denver, Colorado	5,280	58.7
Albany, New York	275	67.3
Portland, Maine	43	77.0
Buffalo, New York	705	89.0
Juneau, Alaska	12	106.3
Sault St. Marie, Michigan	721	108.2

AVERAGE TEMPERATURES—U.S. CITIES

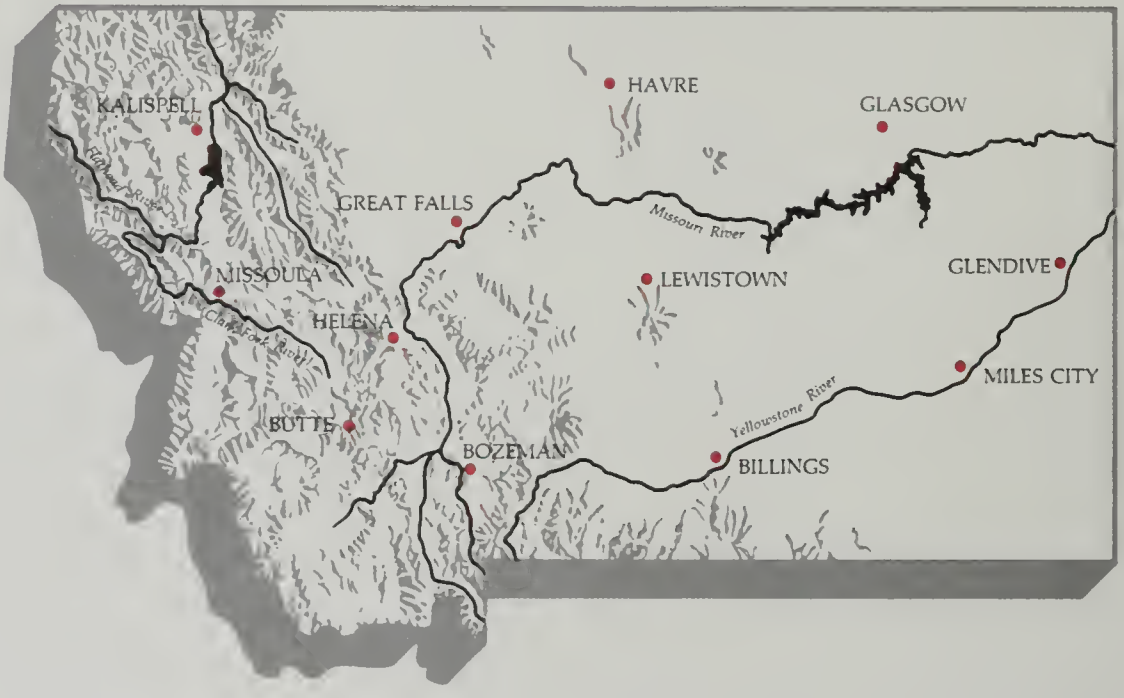
	January	July
Bismarck, North Dakota	8.2	70.8
St. Paul/Minneapolis, Minnesota	11.8	71.2
Sault St. Marie, Michigan	14.2	63.8
Missoula, Montana	**19.2**	**67.0**
Des Moines, Iowa	19.4	75.1
Milwaukee, Wisconsin	19.4	69.9
Great Falls, Montana	**20.5**	**69.3**
Portland, Maine	21.5	68.0
Albany, New York	21.5	72.0
Omaha, Nebraska	22.6	77.2
Billings, Montana	**23.2**	**74.7**
Chicago, Illinois	24.3	74.7
Spokane, Washington	25.4	69.7
Cleveland, Ohio	26.9	71.4
Indianapolis, Indiana	27.9	75.0
Salt Lake City, Utah	28.0	76.7
Denver, Colorado	32.9	74.2

Varied climate, varied terrain.

Five hundred miles long and three hundred miles wide, Montana offers a variety of widely differing terrain, from the forested Rocky Mountains in the west, to rolling plains and rugged badlands in the east.

Montana's climate varies according to altitude and location. Average annual precipitation is 15 inches, but ranges from a low of 6 inches in the eastern part of the state to a high of 120 inches on a mountaintop in Glacier National Park.

Because of its location in a chinook belt, Montana's weather is the most changeable of any area in the nation. Chinooks are warm, dry southwesterly winds that occur on the downwind slopes of the Northern Rockies. In winter, when chinook winds displace retreating cold air, temperatures rise dramatically within a few hours. In central Montana, it is not uncommon to experience a 60-degree temperature change that melts winter snow and brings springlike weather for several days.



MONTANA

WORKFORCE

Rolling up our sleeves.

"When I first considered relocating my electronic equipment manufacturing business from southern California to Montana, the labor market was my greatest concern.

Now, it's my greatest asset.

Shortly after relocating, I recruited the nucleus of skilled workers I needed right from the community. Within months, I had 42 skilled and semiskilled workers manufacturing machines for the semiconductor electronic industry.

I have more trained workers to choose from here than I had in California. And they are by far more industrious. The reason is that they are grateful to be working at a job they like and living in a state they love.

There simply isn't anywhere on earth they would rather be.

If anyone were doubtful about Montana as a place to do business, I think they would consider it seriously after taking a look at the numbers. Productivity is the key."

Ray Thompson
Semitool, Inc.
Kalispell, Montana

Ray Thompson is president of Semitool, one of three companies in the nation that manufacture washing machines for silicon wafers. He markets and services his product nationwide as well as in Europe and Japan. Among his customers are Hewlitt-Packard, Texas Instruments, IBM, Motorola, Fairchild and National Semiconductor. His plant is located in Kalispell, Montana.

Eager. Productive. Dependable. Available.

Montana workers want to stay in Montana.

MONTANA WAGE SURVEY—1980

Occupation	Average Hourly Wage
SECRETARIES	$ 5.80
STENOGRAPHERS	5.67
TYPISTS	4.36
FILE CLERKS	3.94
SWITCHBOARD OPERATORS	3.92
KEY ENTRY OPERATORS	4.51
COMPUTER OPERATORS	5.78
DRAFTERS	6.82
ELECTRONICS TECHNICIANS	9.77
MAINTENANCE CARPENTERS	9.93
MAINTENANCE ELECTRICIANS	10.47
MAINTENANCE PAINTERS	10.10
MAINTENANCE MACHINISTS	10.61
MAINTENANCE MECHANICS (MACHINERY)	10.51
MAINTENANCE MECHANICS (MOTOR VEHICLES)	9.69
MAINTENANCE PIPEFITTERS	10.86
STATIONARY ENGINEERS	9.36
BOILER TENDERS	8.55
TRUCKDRIVERS	9.03
HEAVY EQUIPMENT OPERATORS	9.14
MATERIAL HANDLING LABORERS	7.34
FORKLIFT OPERATORS	7.85
GUARDS	5.57

Source: U.S. Dept. of Labor, Bureau of Labor Statistics

MONTANA EMPLOYMENT BY INDUSTRY—1980

	Number of Workers	Percent of Workforce
Wholesale & Retail Trade	72,300	20.5%
State & Local Government	56,500	16.0%
Services	56,000	15.9%
Self-employed & Other	39,900	11.3%
Agriculture	31,400	8.9%
Manufacturing	23,600	6.7%
Transportation, Communication, Utilities	23,000	6.5%
Construction	14,700	4.2%
Federal Government	14,100	4%
Financial, Insurance, Real Estate	12,900	3.7%
Mining & Energy Development	7,600	2.2%
TOTALS	352,000	100%

Source: Montana Department of Labor and Industry, Employment Security Division.

Worker Productivity

The *1977 Census of Manufactures* ranks Montana 17th among the 50 states in productivity per worker, 8% higher than the national average:

$$\frac{\text{Value Added by Manufacture}}{\text{Number of Production Workers}} = \text{Montana: \$46,005 (U.S. Average: \$42,517)}$$

Montana also ranks 14th most favorable among the 48 contiguous states in relative cost of workers' compensation to the state's manufacturing firms, with a workers' compensation rate of only $1.13 per $100 of payroll. *(Manufacturing Business Climates, 1980)*

Labor Costs

Current manufacturing employment in Montana is concentrated in capital intense heavy industries such as smelting, refining, lumber and paper milling. These industries are relatively high paying, pushing Montana's average manufacturing wage up higher than the national norm.

Montana's apparently high manufacturing wages also result from the relative absence of light, labor-intense industry in the state, which generally pays lower wages. In fact, labor-intense firms in Montana pay 12% less than the national average for those specific industry groups. *(Office of Commerce and Small Business Development, 1980)*

It is estimated that in 1980, earnings of Montana production workers were averaging $6.46 hourly compared with $6.66 hourly for the country as a whole. *(Official Statement, Montana General Obligation Long-Range Building Program Bonds, 1981)*

Labor unions in Montana are firmly in support of positive economic development, and their elected officers frequently join with management and industrial interests to create jobs by promoting favorable economic conditions for business.

Statistically, Montana workers are highly productive. Employers also enjoy lower relative costs of workers' compensation.

Education in Montana

Montana has two universities (approximately 10,000 students each) and nine colleges, for a total college enrollment of 34,000 students.

Montana State University in Bozeman and the University of Montana in Missoula offer a variety of widely recognized graduate and undergraduate courses in the arts and sciences, business administration, engineering, architecture, law, education, medicine, agriculture and home economics.

The Montana College of Mineral Science and Technology, Butte, offers degrees in the sciences and engineering, and has developed several of its programs in cooperation with industry. Most graduates enter the petroleum and nonferrous mineral industries.

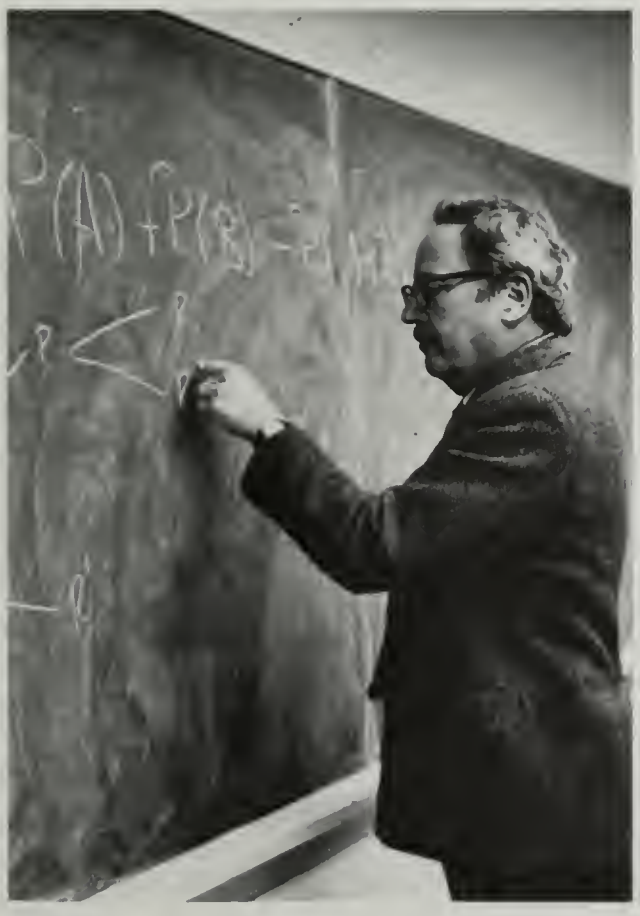
Montana's system of trade and industrial schools consists of five state centers for vocational-technical education, three community colleges, one four-year college and about 30 proprietary institutions. Montana high schools also offer vo-tech courses for adults as well as young people, according to the needs of the communities they serve.

During 1981, Montana vocational schools trained nearly 6,000 people to join the skilled work force as computer programmers, accountants, welders, industrial electronics workers, airframe maintenance technicians, auto mechanics and agri-mechanics, to mention a few. Most schools are prepared to develop new programs as necessary to meet the demands of business and industry.

Research Facilities

Both the University of Montana in Missoula and Montana State University in Bozeman have respected research capabilities and in recent years have developed nationally recognized programs in engineering, immunobiology, surface physics, plant pathology, political economy of natural resources, coal technology, cancer virus replication and limnology, to name a few. Both universities have succeeded in gaining substantial research funding from such prestigious sources as the National Science Foundation, National Institute of Health, U.S. Department of Energy and the U.S. Agency for International Development.

In Butte, the Montana College of Mineral Science and Technology has extensive research facilities in the environmental and energy sciences, and in geological, geophysical, metallurgical, mineral processing, mining and petroleum engineering. This school is a nationally acknowledged source of expertise on the coal hydrology and geology of the Northwest region.



Education, industry and government often work cooperatively to develop new training programs for specialized skills needed by incoming employers.

Can we train workers for you?

Montana's energetic vocational-technical education system is eager to work with companies that require workers with specialized skills.

Through the efforts of the Montana Private Industry Council, training and upgrading programs are closely coordinated with economic development activities in the state, and procedures have been streamlined to make it as easy as possible for employers to participate.

Pre-Industrial Start-Up Training

This new program finds and trains workers for any new or expanding industry in Montana, at no cost to the employer. Since its inception, the program has trained 220 Montana workers in specialized skills ranging from electronics to chemicals handling. Training has been scheduled for an additional 800 workers in 1982.

All Montana citizens may apply for training under the program, and trainees typically are employed in another field with a desire to upgrade their skills. Most are highly motivated, undergoing evening training on their own time, and at their own expense, after working full time at another job during the day.

Employers need only to specify how many workers are needed, the skill levels required, and an approximate plant start-up date. All advertising, screening, testing and interviewing are performed by the Montana Job Service, and workers are custom-trained to meet or exceed job entry level skill requirements set by the employer. Employers select trainees from among the applicants for training.

On-The-Job and Classroom Training

Employers who hire and train unemployed individuals are reimbursed for the costs associated with the training—up to 50% of the trainee's wage, throughout the training period.

Montana Job Service will handle the screening and referral of these workers, before the employer makes the final selection. Program participants may also receive classroom training, counseling, orientation and support services at no cost to the employer.

Classroom instruction may be designed specifically to meet the needs of new or expanding industry, and employer input in the training design is welcomed. The goal is to have trained workers ready by the time a new industry opens its doors. Participants are enrolled through the Montana Job Service.

Montana offers extensive vocational and technical education, and trained workers with a variety of skills are available to business and industry.

MONTANA

TRANSPORTATION

Open door to the Northwest.

"I ship worldwide and I ship economically from Bozeman, Montana.

There is a perception that Montana is isolated from major markets and, therefore, not a good place to do business. My experience has proven otherwise.

We are manufacturing industrial electronic equipment in Bozeman, Montana, and shipping it to nearly every free country in the world. Bozeman has reliable air service that is rarely interrupted by the weather.

Sure, my transportation costs are up, but these days, freight doesn't come cheap anywhere. A high technology product with a high dollar-per-pound value makes my shipping economical.

And what a great place this is to live."

John Duncan
Summit Engineering
Bozeman, Montana

John Duncan is president of Summit Engineering, a part of the Controls Division of the Dana Corporation. Summit designed and manufactures the "Bandit" and the "Taskmaster," machine tool control systems. A Westerner by birth, Duncan earned his master's degree at the University of Wyoming and did postgraduate work at Montana State University in Bozeman. When it came time to put his skills to work, he chose Bozeman as his home base and built a business called Summit Engineering. The firm was later acquired by the Dana Corporation and now employs between 250 and 300 workers.

Airlines

Four major airlines serve Montana—Northwest Orient, Western, Frontier and Republic—and offer both passenger and freight service. Non-stop flights are provided to Minneapolis, Chicago, Denver, Salt Lake City and Spokane from the state's larger cities. Montana's five largest urban centers each have between 8 and 45 commercial flights leaving daily for points outside the state.

Big Sky Airlines, a Montana-based corporation, provides service to 10 cities in Montana, six cities in North Dakota, two cities in Wyoming, Minneapolis and Calgary.

Montana has 121 public-use airports. Fifteen have commercial air carrier service, and 75 can handle light and medium twin-engine aircraft. Montana has 57 fixed-base operators offering charter service.

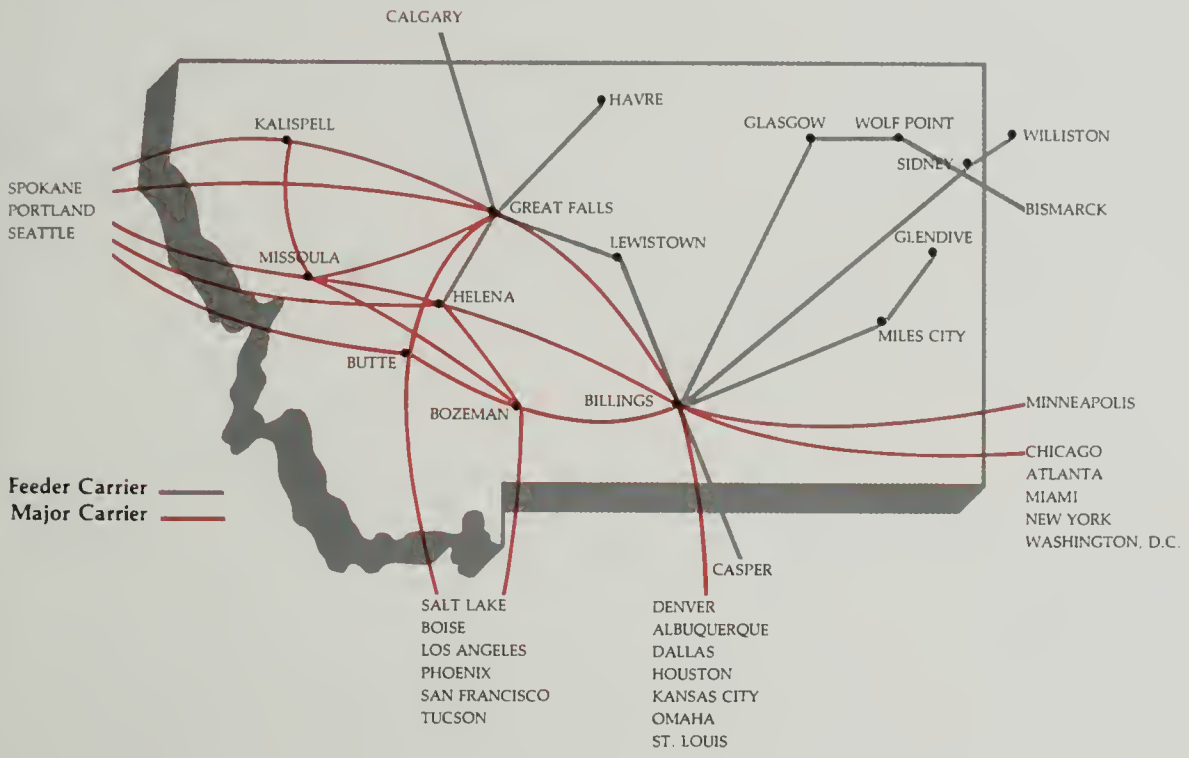
Highways

There are 14,200 miles of modern, paved highways in Montana, including north/south and east/west interstate systems. The interstate highway which includes I-90 and I-94 runs east to Bismarck, Minneapolis and Chicago, and west to Spokane, Portland and Seattle. Highway I-15 travels north to Edmonton and Calgary, Alberta, and south to Salt Lake City, Boise and Los Angeles. Several other major highways also cross the state.

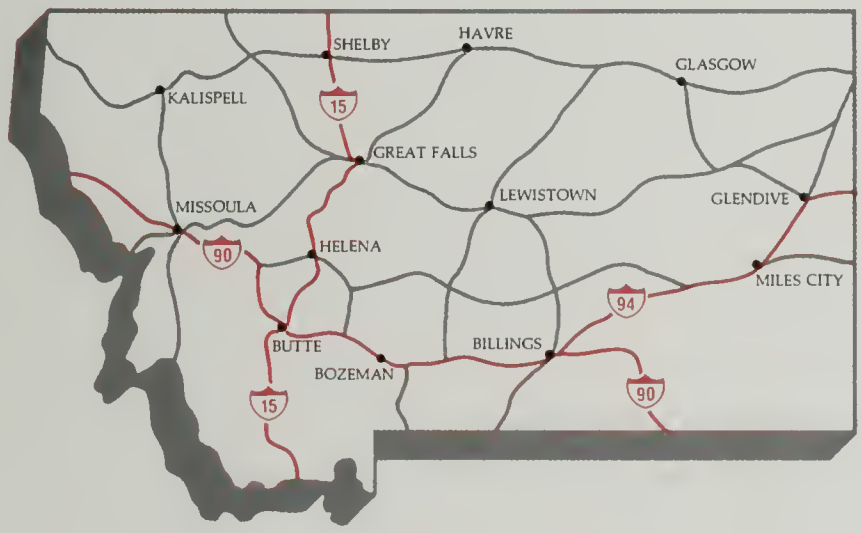
Frequent air schedules and uncrowded highways provide easy access for passengers or freight to and from anywhere in the nation.

COMMERCIAL AIR ROUTES

As of February 1982



MONTANA HIGHWAYS



Commercial Trucking

Montana is extremely well served by more than 3,500 intrastate, interstate and international commercial carriers. The larger common carriers include Garrett Freight Lines, Consolidated Freightways, Salt Creek Freightways, Pacific Intermountain Express (PIE) and Transystems, Inc.

Several specialized carriers haul Montana commodities such as petroleum products, timber, livestock and grain to markets outside the state.

Multimodal transport facilities are also available to Montana shippers. Grain and other agricultural products are routinely trucked to Lewiston, Idaho, where they are transported by barge on the Snake and Columbia Rivers to Portland, Oregon.

United Parcel Service has 17 centers in Montana, with air and truck delivery to all points within the U.S.

The 10 intercity bus lines that serve Montana also offer efficient interstate and intrastate freight service.

Expediting Services

Montana is also served by the usual expediting services—Federal Express, Airborne, Express Mail—offering overnight delivery to most points in the nation.

Common carriers, specialized commodity carriers, and expediting services serve business and industry's transportation and communication needs in Montana.

Railways

More than 5,000 miles of rail connect Montana with other states and markets, carrying Montana products to California, the Mississippi Valley, the Gulf Coast, Canada, and West Coast seaports.

Montana's primary east-west rail service is provided by two Burlington Northern main lines with valuable routes to the Midwest and East, Gulf Coast ports and the Pacific Northwest. Montana is on the rail portion of the land bridge routes giving coastal access to and from the Far East.

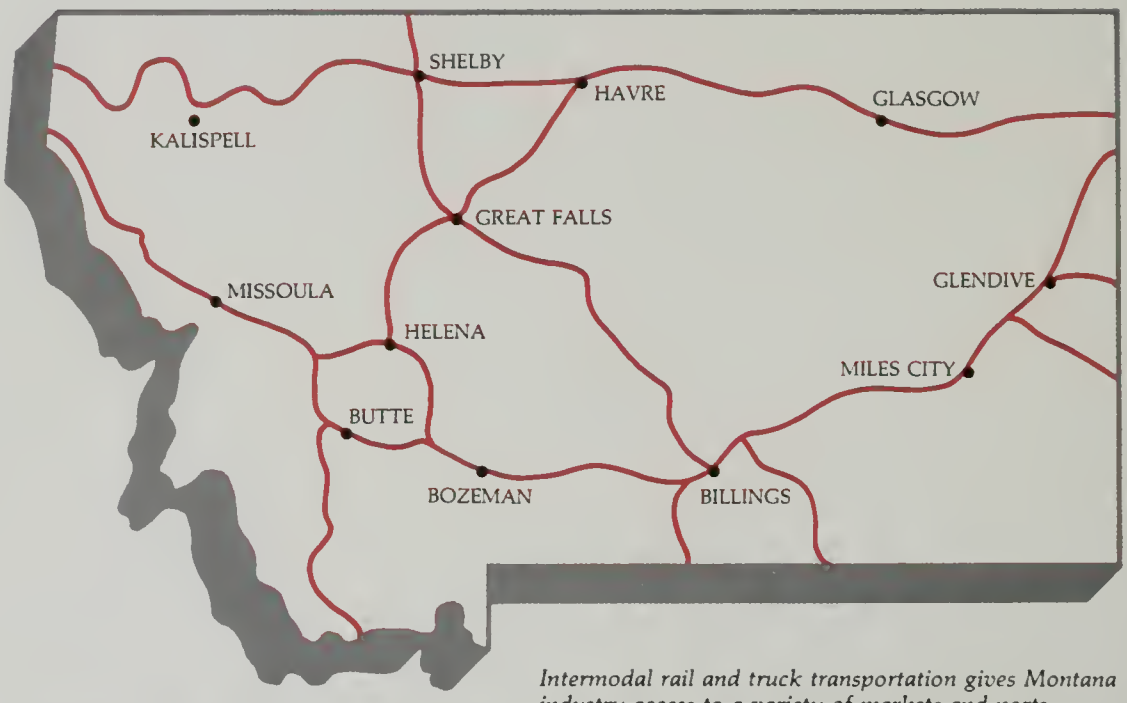
The Union Pacific provides important access to the Midwest and Southwest and California. A shorter route of the Soo Line enters the eastern portions of the state. Railroads offer several industrial parks and numerous on-line locations for industry.

The Port of Butte is a shipping facility that specializes both in containerized cargoes received by rail directly from ships docking at Seattle and in products to be containerized in Butte for shipments leaving from Seattle for foreign countries. The Port of Butte offers low-cost unpacking and breaking down of foreign shipments destined for certain midwestern and eastern cities, and also has warehousing facilities available.

While Montana may appear to be "off the beaten path," transportation to and from the state puts it into the mainstream. Air, truck, and rail services tie the state closely to major markets.

MONTANA RAILWAYS

(Branch lines not shown)



Intermodal rail and truck transportation gives Montana industry access to a variety of markets and ports.

MONTANA

ENERGY
RAW MATERIALS
WATER
LAND

A wealth of resources.

"Anyone in the raw material business would be attracted to Montana at first glance because of its wealth of minerals, timber and energy.

I'm enthusiastic about Montana as a place to do business because there are still a lot of resources in what I would call "non-conflict" areas ... areas that have not already been designated for another use."

Bob Kelly
Champion International
Missoula, Montana

Bob Kelly, a Montana native and University of Montana graduate, is public affairs manager for Champion International's Rocky Mountain region. Champion's investment in Montana is substantial. It includes 683,000 acres of timberlands; the largest softwood plywood plant in North America; several sawmills that produce a wide variety of lumber products; and the largest of Champion Packaging's pulp and linerboard mills. There are about 2,500 Montanans directly employed by these operations.

Low-Cost Energy

Montana industries pay substantially less for energy than the majority of the nation, partially due to the state's abundance of low-cost hydroelectric power. Montana ranks third lowest among the 48 contiguous states in energy cost per million BTUs *(Manufacturing Business Climates, 1980)*.

Montana can be expected to maintain its utility cost advantage over the long term. The state contains large reserves of coal, oil and natural gas, enabling it to economically supply substantial amounts of its own energy well into the future.

Montana's oil and gas industry has been active since the 1920s, and it is generally agreed that Montana has the greatest potential for discovery of new fields of any non-coastal state. Interest is also focusing on the vast, low-sulphur coal reserves in the Fort Union Region of eastern Montana, known to have the nation's greatest potential for fossil fuels development.

ENERGY COST COMPARISON INDICES—1979

Energy costs in Montana are appreciably lower than in many other states. In the chart below, 100 is average.

	Electricity	Gas
Alabama	94	79
Arkansas	102	73
California	130	113
Colorado	89	67
Georgia	106	79
Idaho	52	113
Illinois	109	103
MONTANA	30	87
Nevada	100	101
New Jersey	157	134
New York	126	128
North Dakota	114	104
Oklahoma	94	89
Oregon	41	117
Pennsylvania	125	117
South Dakota	98	68
Texas	95	116
Utah	91	66
Washington	20	119
Wyoming	55	65

Source: Chase Econometrics, Inc.

As the nation looks to the future, Montana offers great potential in low-cost energy from oil, natural gas and coal.

Abundant Raw Materials

Nationally, Montana is a leading producer of agricultural products, minerals and timber, and processing of these commodities accounts for 75% of Montana's manufacturing income. Yet there are still tremendous opportunities for processing of these raw materials.

Agricultural Products

Well known nationally and internationally for its wheat, barley and beef, Montana also produces a variety of other crops and livestock in quantities large enough to support the growth of local processing industries.

Montana ranks in the top 15 states in the production of sugar beets, honey, oats, beef and sheep. Other common Montana crops include dry beans, potatoes, corn, safflower, flaxseed, mustard seed, cherries, poultry and hogs.

Processing of agricultural products is a major industry in Montana, with some 150,000 head of all types of cattle slaughtered annually in the state.

Timber

More than 1.2 billion board feet of lumber is produced annually in Montana, ranking it 9th among the 50 states in total lumber production *(Western Wood Products Ass'n. and U.S. Census Bureau, 1978).*

About 30% of Montana manufacturers are involved in the lumber, wood products and associated industries, accounting for 34% of the state's manufacturing work force. The majority of these industries are sawmills and stud mills, plywood and particleboard plants, pulp and paper mills, and post and pole plants.

Secondary wood products manufacturing plants produce log housing, modular construction components, mobile homes, wooden furniture, beekeeping supplies and other items.

Vast forests, many managed by major lumber companies, produce wood products used across the nation.

1979 LUMBER PRODUCTION

Species	Million Board Feet
Douglas Fir & Larch	485
Ponderosa Pine	157
Lodgepole Pine	144
Engelmann Spruce	133
Hem/Fir	81
Idaho White Pine	27
Other	230
TOTAL	1,257

Minerals

As the world's mineral reserves grow short, exploration and mining continue to increase in Montana. Beyond production of oil, coal and natural gas, Montana has vast and relatively undeveloped reserves of many minerals that are key to American industry.

The state's non-fuel minerals production is currently valued at nearly $300 million annually, with copper and silver the greatest revenue-producers. Antimony, gold, lead, molybdenum and zinc are also being mined in the state, and undeveloped deposits of these metals and others—chrome, iron, platinum, paladium, nickel and tungsten—are being explored and prospects for development are promising.

Vast deposits of phosphate rock lie fully mapped in southwestern Montana, and commercial bentonite is common in eastern Montana. Both commodities are in production, but their potential is just beginning to be developed. Montana gypsum, vermiculite, barite, limestone, sand, gravel and building stone supply local construction materials industries. Gypsum, vermiculite and limestone are shipped to markets outside the state. Montana has the largest pure deposits of talc in the U.S., and also produces metallurgical grade silica.

While well known for the Berkeley Pit in Butte, Montana's other mineral resources are now being explored and prospects are promising in several areas of the state.

NON-FUEL MINERALS PRODUCTION IN MONTANA—1980

		Quantity	$ Value (thousands)
Antimony	short tons	705	NA
Clays	thousand short tons	514	$ 13,594
Copper (recoverable content)	metric tons	45,061	100,486
Gem stones		NA	97
Gold (recoverable content)	troy ounces	24,240	14,866
Lead (recoverable content)	metric tons	252	239
Lime	thousand short tons	200	9,328
Sand and gravel	thousand short tons	4,900	10,000
Silver (recoverable content)	thousand troy ounces	2,454	52,767
Stone (crushed)	thousand short tons	2,450	7,600
Talc	thousand short tons	235	13,214
Zinc (recoverable content)	metric tons	70	58
Other minerals (including barite, cement, gypsum, iron ore, peat, phosphate rock, stone, tungsten and vermiculite.)			60,150
		TOTAL	$282,399

NA—Not available. Source: U.S. Bureau of Mines

Water

Montana is a headwaters state for two major river systems—the Columbia and the Missouri—and annually produces about 29.6 million acre-feet of water within its borders.

The state's rivers and streams are fed largely by melting snow and spring rains. Natural stream flows peak in May and June, and some of the excess water is typically stored in private, municipal and industrial reservoirs for use during later, low-flow periods.

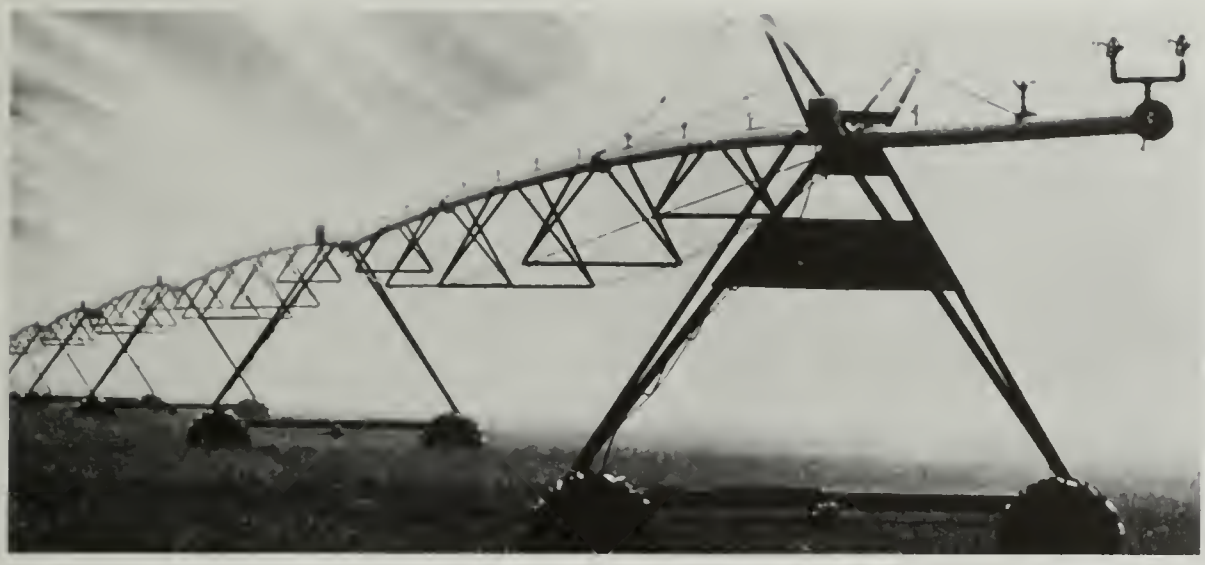
Like all the western states, Montana's water users are governed by a "doctrine of prior appropriation," meaning users with an earlier right have precedence over users with a later right. Users are not entitled to water rights unless they put the water to beneficial use.

About 95% of current water use in Montana is for irrigation of farmland, with the balance going for thermo-electric power generation, industrial, commercial, residential and livestock purposes. Montana's water reservation system allows municipalities to reserve water for future use, which can include industrial use.

The State of Montana is implementing aggressive new legislation initiated by Governor Schwinden for the development and storage of Montana's water resources.

Most areas of Montana have adequate or abundant surface or ground water for future industrial growth. There are some constraints, however, including low-flow periods and existing rights on certain rivers and reservations for in-stream flow on the Yellowstone River, a major tributary of the Missouri. State resource officials can advise potential users on water availability in various parts of the state.

Water from Montana's snow-fed rivers and streams is a significant natural resource, well-managed for agricultural and industrial use.

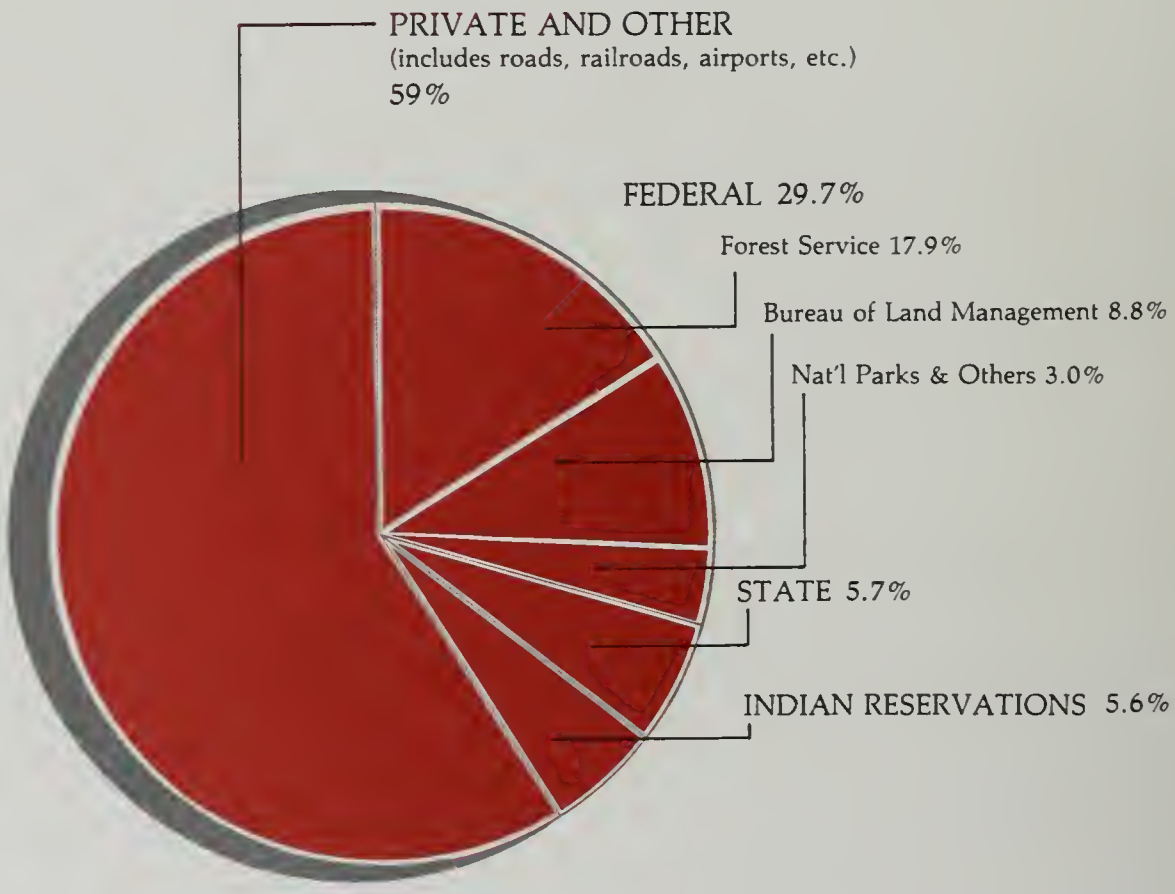


Land

The nation's fourth largest state, Montana is a land of vast and varied dimensions—500 miles long and 300 miles wide, with a land area of 93,157,952 acres. The eastern two-thirds of the state consists of plains broken by occasional mountain ranges. The western third is mountainous and timbered, with the Continental Divide running north and south between Glacier and Yellowstone National Parks. The Federal Government, through its national parks, national forests, wilderness areas and rangelands, controls nearly 30% of the state's land, mostly in western Montana.

Suitable land is available for manufacturing sites in many communities in Montana. Eleven of these communities have fully developed industrial parks with ready access to transportation systems.

MONTANA LAND OWNERSHIP



Source: "Public Land Statistics, 1976" and Montana Dept. of Lands.

MONTANA

FINANCING ALTERNATIVES
TAX INCENTIVES
TAXES AND LICENSES

The bottom line.

We see the decade of the 1980s as a particularly appropriate period for business to consider investing in Montana.

We have water, we have energy, and best of all we have a work force of friendly, hardworking people. Our society is changing, and those changes favor Montana as technology replaces the old ways of doing business and allows companies to operate effectively in less congested environments.

D.A. Davidson & Co. competes well from its Montana location because of modern communications technology and hardworking professionals.

Montana can't miss, and we recommend it highly!"

Ian Davidson
D.A. Davidson & Co.
Great Falls, Montana

Ian Davidson is president of D.A. Davidson & Co., a Montana-based brokerage firm that ranks in the top 4 percent of the nation's brokerage houses and is the second largest firm in the Pacific Northwest. In 1981, Davidson won the National Awards Competition for Innovations in American Finance for a customer stockholder plan DAD devised for Montana Power Company. Forbes Magazine describes D.A. Davidson & Co. as having "evolved into the quintessential regional brokerage firm." (Forbes, October 27, 1980)

Montana ... a promising financial environment.

Montana legislators are striving to create a favorable financial environment for business.

During the 1981 legislative session alone, Montana lawmakers repealed the inventory tax, increased small-business investment tax credit by 50%, and cut red tape by creating a small-business licensing center.

In financial and investment circles, Montana stands out as a good risk. In 1981, when Moody's Investors Service refined its rating system, only two states—Montana and New Mexico—were upgraded. Montana's rating advanced from Aa to Aa-1. The upgraded rating reflects the state's growing mineral resources, conservative debt and financial policies, and low debt burden.

In the 1980 COSMA report on *Manufacturing Business Climates* in the 48 contiguous states, Montana ranked 8th lowest in state debt per capita, and 9th lowest in percentage change in state and local taxes per capita.

Many sources of financing are available to business and industry locating in Montana.

Sources of Industrial Financing

Industrial Revenue Bonds

At least $250 million in Industrial Revenue Bonds have been issued since Montana's Industrial Revenue Bond Act was declared constitutional in 1970. Local governing bodies are almost universally willing to issue revenue bonds if the project will provide jobs for the community.

Industrial Revenue Bonds may be issued to buy land, construct buildings and purchase equipment for a variety of new or expanding industrial projects, including manufacturing, commercial and agricultural enterprises, recreation or tourist facilities, medical and governmental structures and multi-family housing.

Interest earned on the bonds is exempt from both state and federal taxes when the bonds are sold in compliance with IRS regulations.

Investment Banking Firms

The state's investment banking firms are involved in developing capital for business and industry through underwriting Industrial Revenue Bonds, corporate bonds, and raising equity capital through stock issues and other innovative means of financing.

One of the nation's leading regional investment banking firms is headquartered in Montana, offering new and expanding businesses a thorough knowledge of the region together with a willingness to handle smaller issues.

Local Development Corporations

A number of local, non-profit economic development corporations are active in the state of Montana. Many offer developed industrial property, buildings via lease/purchase agreements, maximum available tax advantages and favorable financing arrangements.

Commercial Lending Institutions

There is a total of 165 commercial banks in Montana, with combined assets totaling more than $5 billion at the end of 1980. Several of these are affiliates of major out-of-state holding companies, including the First Bank System, Northwest Bancorporation and First Interstate Bancorp.

Montana also has 15 state and federally chartered savings and loan associations with combined assets of $1.3 billion, and 132 state and federally chartered credit unions with combined assets of $346 million.

Small Business Administration

Nearly all businesses are eligible for federal SBA financing of buildings, equipment and operating capital. SBA loans are administered by local banks, with the SBA guaranteeing up to 90% of loans up to $500,000. Borrowers may take 7-10 years to repay, compared with 3-5 years for most conventional bank loans.

Private Industry Council

The Private Industry Council was established by the State of Montana to encourage involvement by business and industry in local job training programs, and other activities which generate employment for Montanans.

Since its inception in 1980, the Council has provided numerous small businesses and local development groups with the funds they needed to conduct feasibility studies for business start-ups or expansions, develop marketing programs, prepare financial packages to support loan applications to government or commercial lending institutions, obtain management consulting services, and conduct a variety of training programs. During 1981, the Council disbursed in excess of $1.2 million to support these activities.

Industrial Tax Incentives

The following is a general outline of taxes and industrial tax incentives in the State of Montana. It should not be considered a substitute for the actual tax laws. Complete information on taxes and incentives that apply to your business may be obtained by contacting the Montana Department of Commerce.

Property Tax Reductions Subject to the approval of the local governing body, new or expanding industries may receive a 50% or a 73% reduction in property taxes. The 50% reduction applies to the first five years after construction permits are issued on improvements to real property. The percentage increases by 10% annually after the 5th year until the full taxable values are attained in the 10th year. The 73% property tax reduction applies only to new manufacturing industries, and is effective during each of their first three years of operation in the state.

In recent years, Montana has aggressively redesigned its tax structure to attract new employers.

No Inventory Tax Business inventories of individuals and corporations are exempt from property taxes.

No Use Tax Montana has no use tax on the purchase of equipment, and no general sales tax.

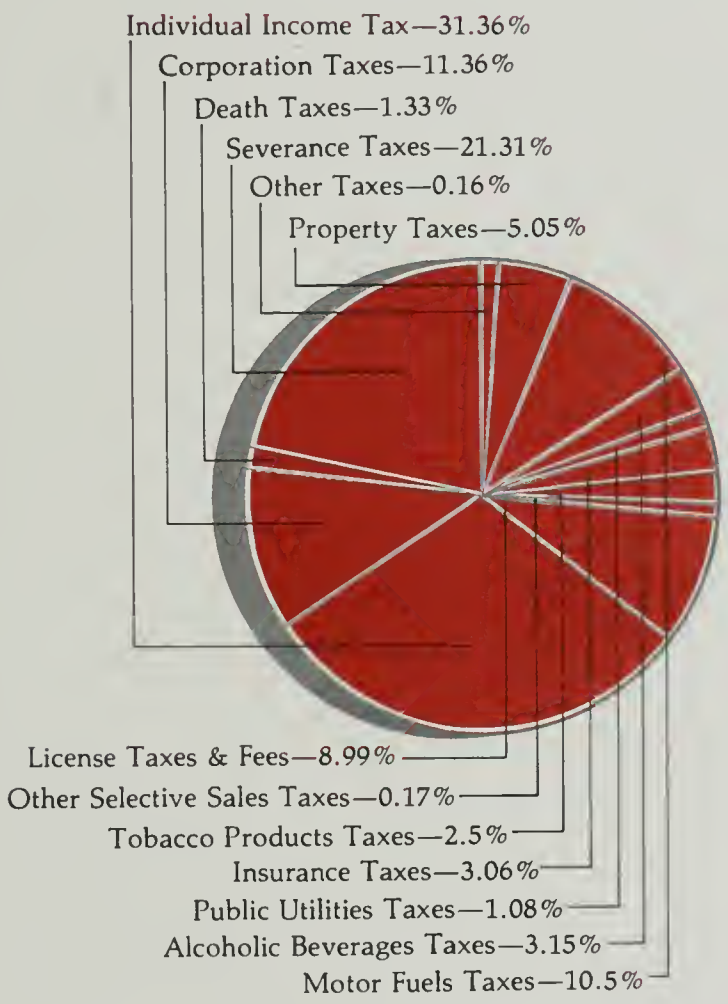
Corporate License Tax Credit New and expanding industries engaged in the mechanical or chemical transformation of materials or substances into new products are eligible for a 1% corporate license income tax credit in each of their first three years of operation. The credit is based upon total new wages paid, and for labor-intensive firms, virtually eliminates the Corporate License Tax.

Mill Levy Funding A one-mill levy is authorized for purposes of economic development within any Montana city, county or town, if approved by local voters. These funds may be used for developing industrial parks, buildings to house manufacturing operations, feasibility studies, and other activities associated with economic development.

Investment Tax Credit Individuals and corporations that qualify as "small business corporations" may use 30% of their Federal Investment Tax Credit as a credit against state income tax liability or corporation license tax liability.

Pollution Control Incentive Air and water pollution control equipment is taxed at 3% of market value for property tax purposes. This includes facilities, machinery or equipment used to reduce or control water or atmospheric pollution or contamination by removing, reducing, altering, disposing or storing pollutants, contaminants, wastes or heat.

MONTANA STATE TAX REVENUES—1981



General Taxes

Property Tax

A little less than half (47%) of Montana's total tax revenue comes from property taxes. A large proportion of this money is spent to maintain strong local government and school systems, with only about 5% of property tax revenues going to state government.

The property tax assessment is administered by the State Department of Revenue. Before exemptions or credits, most land and improvements—except agricultural land—are assessed at 8.55% of market value. Manufacturing and mining machinery, fixtures, equipment, tools and supplies are assessed at 11% of market value, except new industrial property which is assessed at 3%.

Individual Income Tax

In 1981, Montana voters adopted an initiative to require indexing of the state individual income tax. This initiative will increase the standard deduction and personal exemption to keep pace with inflation, and prevent "bracket creep."

Taxpayer calculations are similar to the federal personal income tax return, although there are differences in allowable deductions between federal and state returns. Taxpayers may itemize deductions from adjusted gross income, or take a standard deduction equal to 20% of adjusted gross income (up to $1,640 maximum on individual returns in 1981, $3,290 on joint returns). An $880 exemption was allowed for each dependent in 1981.

Montana has a progressive rate structure where, again in 1981, the first $1,100 was taxed at 2%, the second $1,000 at 3%, with similar bracket increments up to the highest marginal tax rate bracket, where all income over $38,400 was taxed at 11%.

A state income tax bill for a hypothetical family of four with standard deductions, and with a gross income of $15,000 in 1981, was $275.80. A family of four with an income of $30,000 paid $995.05 in state income tax that year.

INDIVIDUAL INCOME TAX EXAMPLES

Hypothetical family of four—one wage earner, three dependents:

Gross income	$15,000	$30,000
Typical deductions	4,500	9,935
Personal exemption allowance (4 x $880)	3,520	3,520
TAXABLE INCOME	$ 6,980	$16,545
TAX	$275 ($253 + 6% of amt. over $6,600)	$995 ($883 + 9% of amt. over $15,300)

Corporation License Tax

Corporations are subject to an excise tax of 6¾% of the corporation's net income from sources within the state.

New and expanding industries producing new products are entitled to a three-year corporate license income tax credit of 1%, based on total new wages paid. Industries qualifying as "small business corporations" are not subject to this tax, and not-for-profit corporations are exempt.

In general, in computing net income, a corporation is allowed the same deductions from its Montana gross income as are permitted under the Federal Internal Revenue Code. Federal corporation income tax may not be deducted in determining net income. However, operating losses may be carried forward or back.

If a corporation derives income from both within and outside the state, if its sole business activity in Montana is making sales, if it neither owns nor rents any property in the state, and if its annual gross Montana sales do not exceed $100,000, then it may elect to pay half of 1% of its gross sales in lieu of the Corporation License Tax.

Requirements for Employers

Every employer in Montana who pays wages is required to deduct and withhold tax which is determined by using tax tables issued by the Department of Revenue. In most cases an employer is required to pay the amounts withheld and file a report with the Department on a quarterly basis.

Unemployment Insurance Tax

With certain exceptions, employers are required to pay an unemployment insurance tax on their payroll at quarterly intervals. This tax is used to finance the payment of benefits to unemployed workers. The tax rate for a particular employer is based on an experience rating system that monitors the benefits charged against the employer's account.

Montana's unemployment insurance rates for 1982 range from 1.5% to 4.4% of the first $8,000 of an employee's wages. Montana offers a reduced rate for new employers. For example, in 1982, instead of paying the maximum rate of 4.4%, new employers will pay 3.5%.

Montana's Unemployment Insurance Trust Fund is solvent and stable. Barring unforeseen changes in Montana's economy, the trust fund will remain strong. Consequently, unemployment insurance tax rates are not expected to fluctuate dramatically.

Workers' Compensation

The Workers' Compensation Act of Montana, with limited exceptions, requires all employers to carry insurance that provides compensation and medical benefits to employees injured on the job. Neither general liability nor health and accident insurance policies are substitutes for workers' compensation insurance.

Employers may obtain coverage through certain private insurance companies, or from the state-operated insurance companies. Certain large employers are allowed to self-insure. Employers pay the insurance premiums based on a percentage of employees' salaries. The law prohibits employers from deducting or obtaining any part of the premium from employee wages.

Montana has a progressive workers' compensation system that has been able to hold insurance premium costs at a competitive level.

The Department of Commerce is your advocate.

Our purpose is to assist you as you consider Montana as a location for your business.

And when you make the location decision, we provide the information and communications you need to make a trouble-free move. We can be of particular help with:

- Site selection
- Liaisons with business and community leaders
- Community information
- Sources of financing
- Licensing, tax laws and business regulations
- Labor statistics, worker training programs
- Technical assistance on availability of energy and other resources

Please direct your confidential inquiry to:

Gary Buchanan, Director
Montana Department of Commerce
1424 9th Avenue • Room 1
Helena, Montana 59620 or call (406) 449-3494

Gary Buchanan is the director of Montana's Department of Commerce, created in 1981 to encourage business and industrial development in the state. Also chairman of the State Banking Board, Buchanan is a former corporate and municipal bond specialist with Merrill Lynch, Billings. He holds a B.A. degree from the University of Colorado, with graduate work in public administration, and management consulting and training.

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Semitool, Inc.
Sheraton Hotels
Sirco Manufacturing, Inc.
Summit Dana Industrial
Truzzolino Food Products Co.
University of Montana
Weyerhaeuser Company

And special thanks to the many businesses, manufacturers and agricultural enterprises who have already built their future in Montana. They know our state truly is a place to soar.

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